



**MARIN COUNTY WORKSHOP**  
DAVID VAUTIN, MTC – MAY 20, 2017

# VITAL SIGNS

MTC

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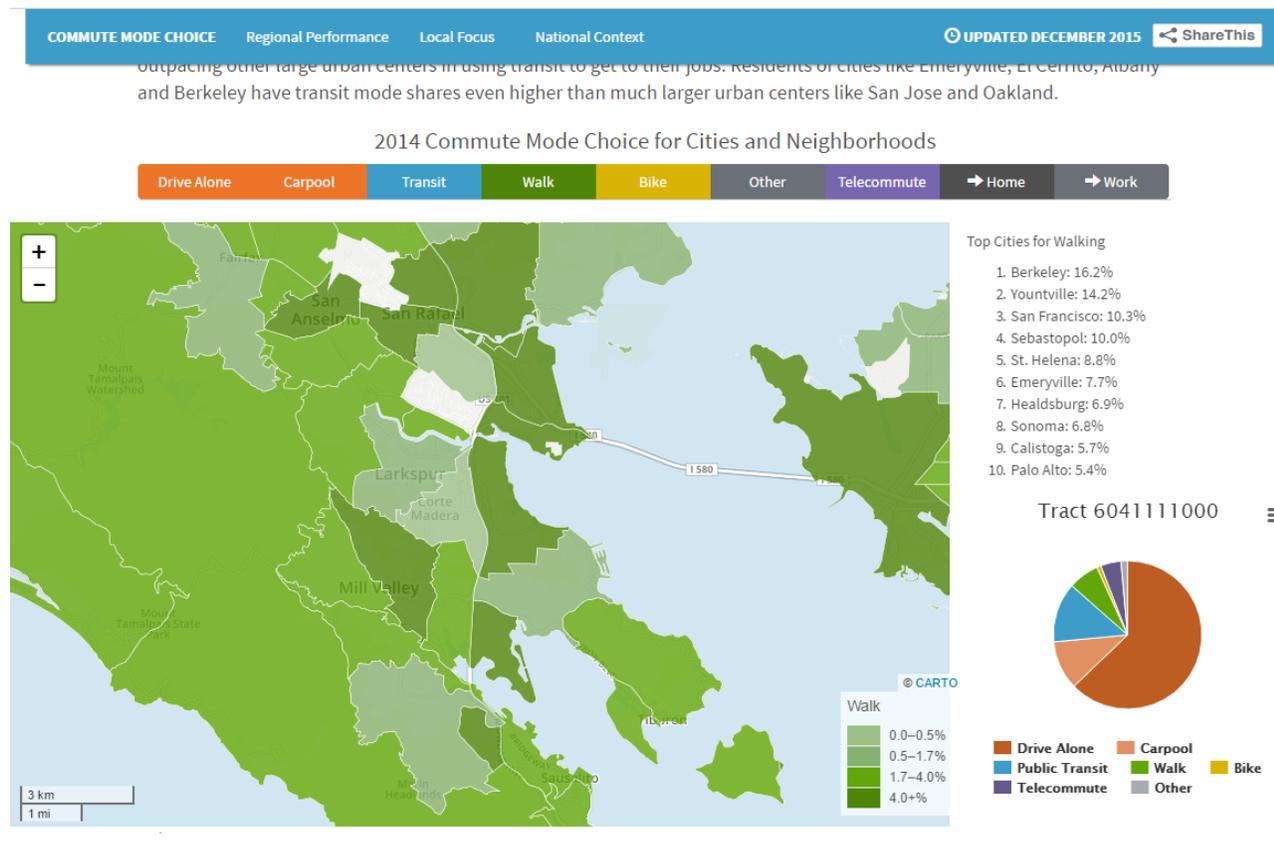
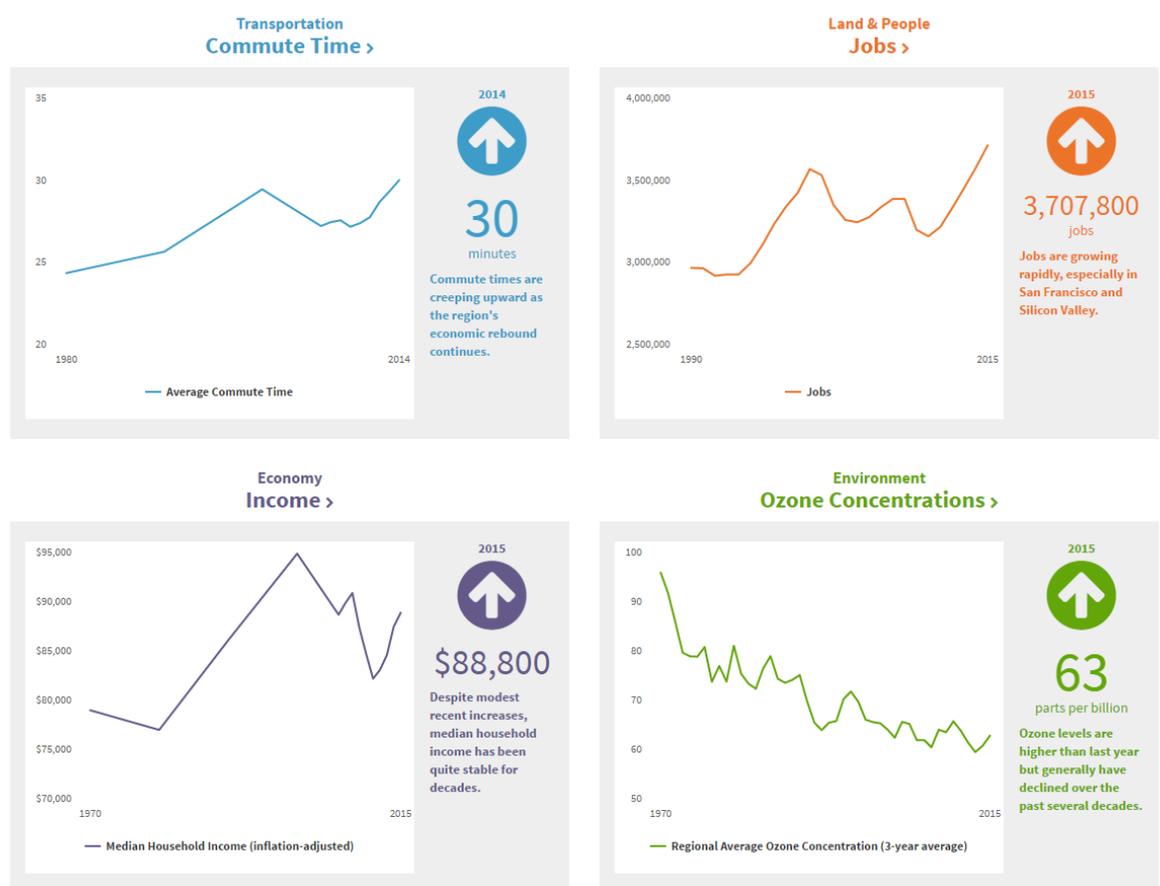
**Vital Signs tracks 40 performance indicators to understand if the Bay Area is (or is not) making progress towards key regional goals.**



## The interactive Vital Signs website allows residents to explore trends on the regional, county, city, and even neighborhood levels.

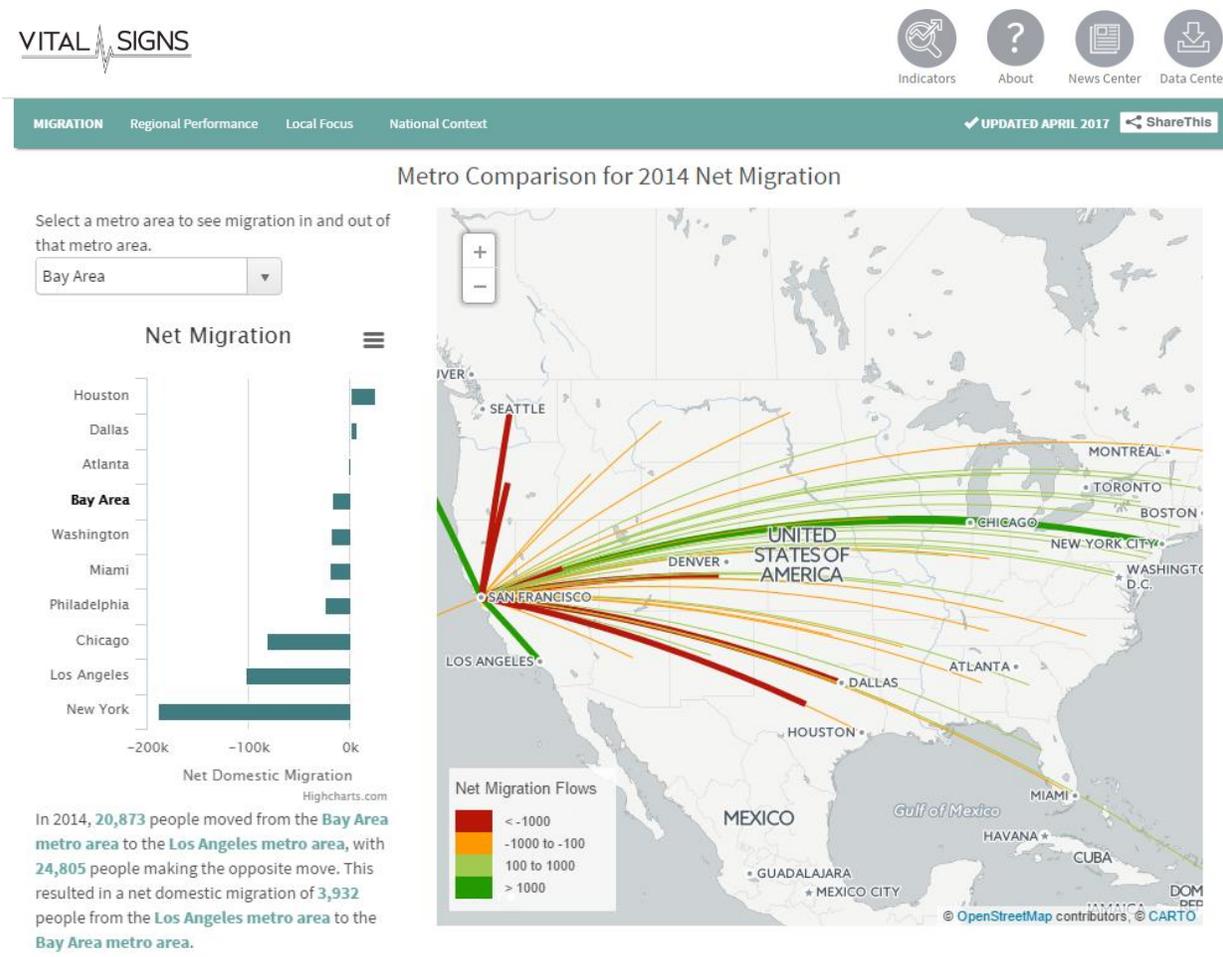
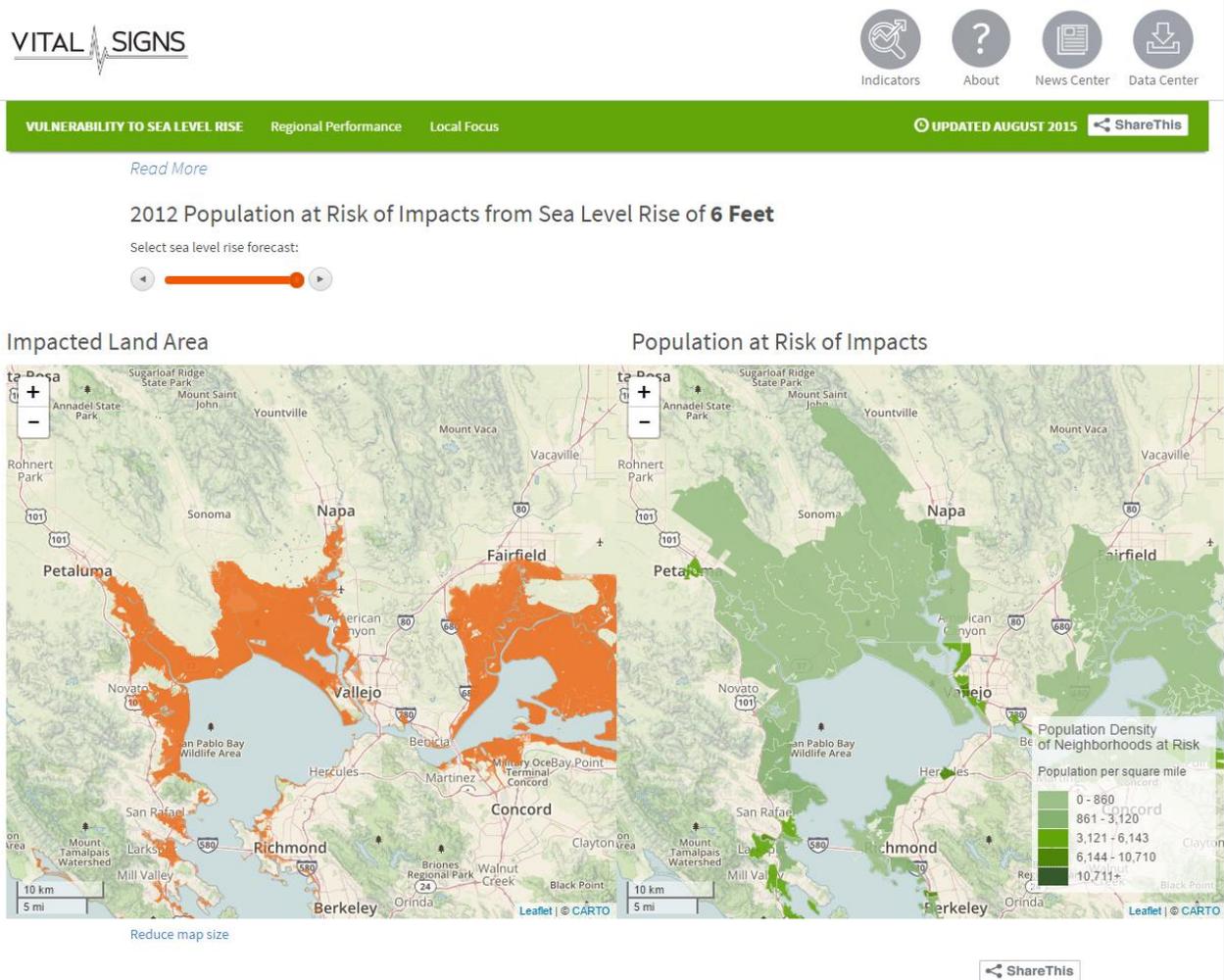


### What's the latest pulse of the Bay Area?



[vitalsigns.mtc.ca.gov](http://vitalsigns.mtc.ca.gov)

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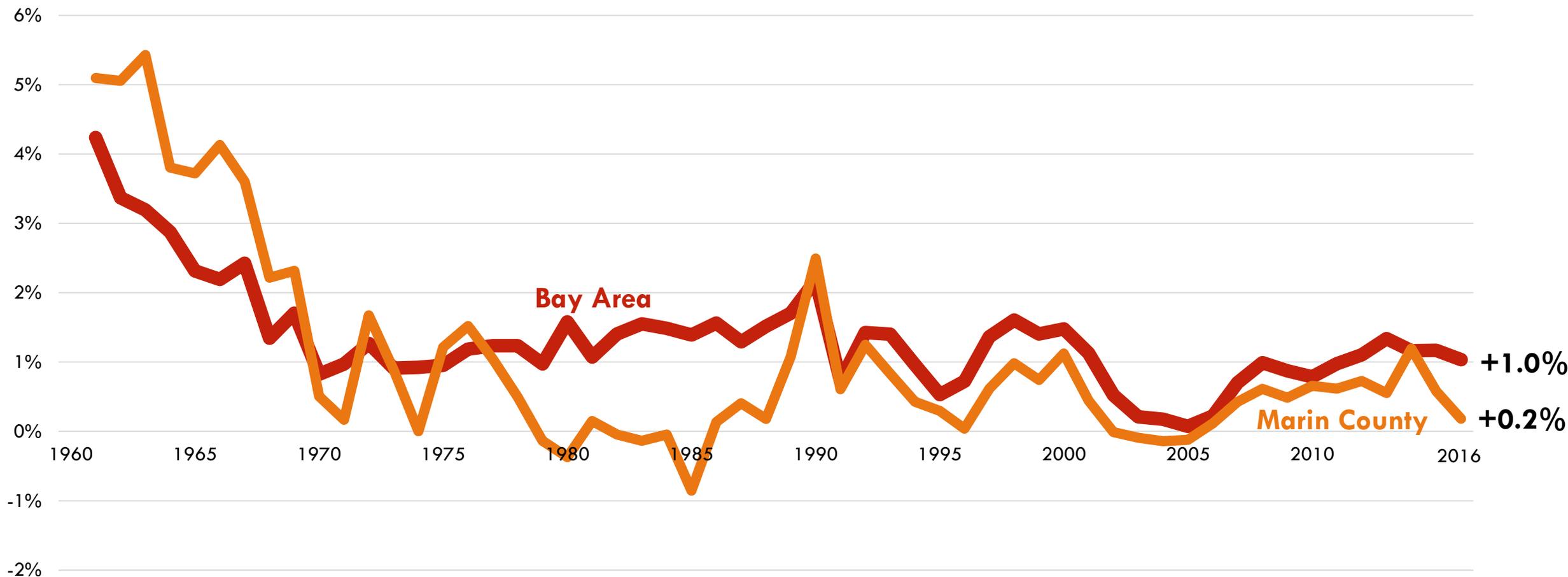
[vitalsigns.mtc.ca.gov](http://vitalsigns.mtc.ca.gov)

- 1** While growth in the Bay Area has slowed over time, Marin County has decelerated more rapidly than other counties.
- 2** The current economic boom has resulted in low unemployment and a widening gap between rich and poor.
- 3** While Marin County is more prosperous than its peers, it too is experiencing impacts from displacement and migration.
- 4** Given a lack of alignment between jobs and housing, traffic congestion and commute times have increased.
- 5** Despite these local and regional challenges, Marin has been a leader in protecting agricultural lands and open space.

REGIONAL PERFORMANCE

# Marin County's population growth has slowed over time.

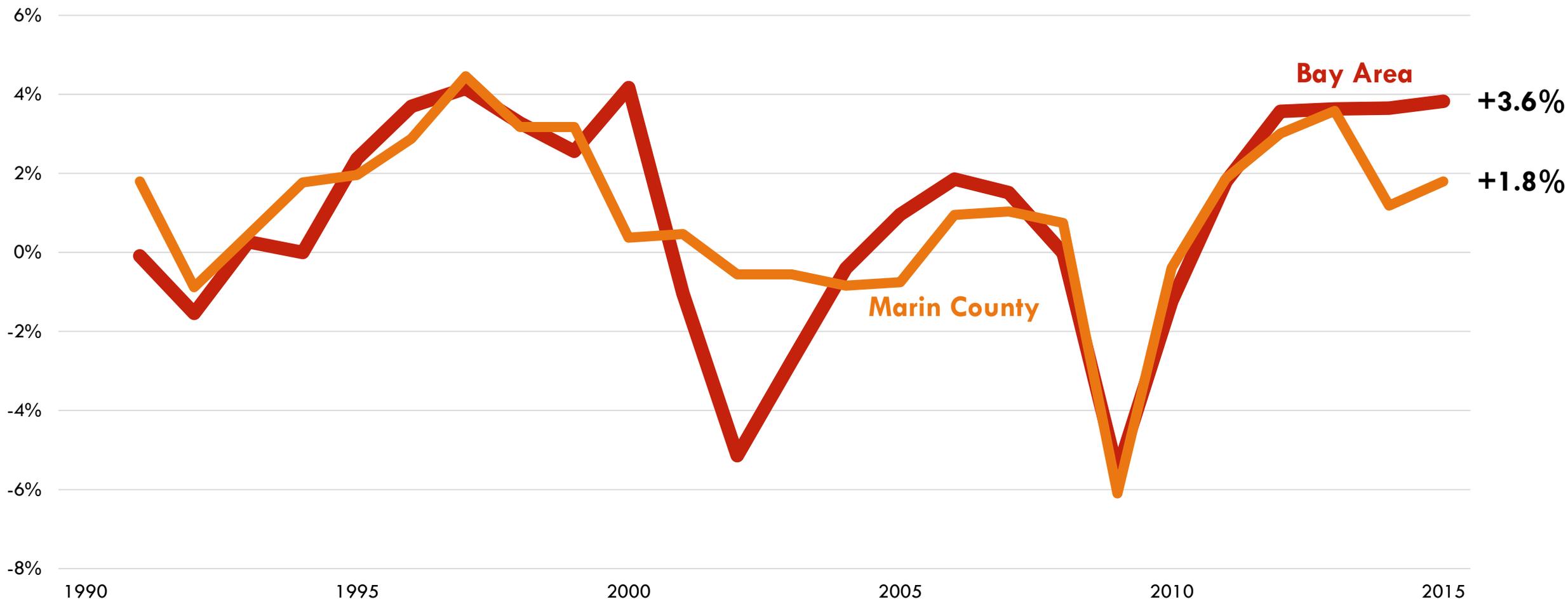
ANNUAL PERCENT POPULATION GROWTH – BAY AREA & MARIN COUNTY



REGIONAL PERFORMANCE

# Marin County's job growth has slowed in recent years.

ANNUAL PERCENT JOBS GROWTH – BAY AREA & MARIN COUNTY



Source: California Department of Finance

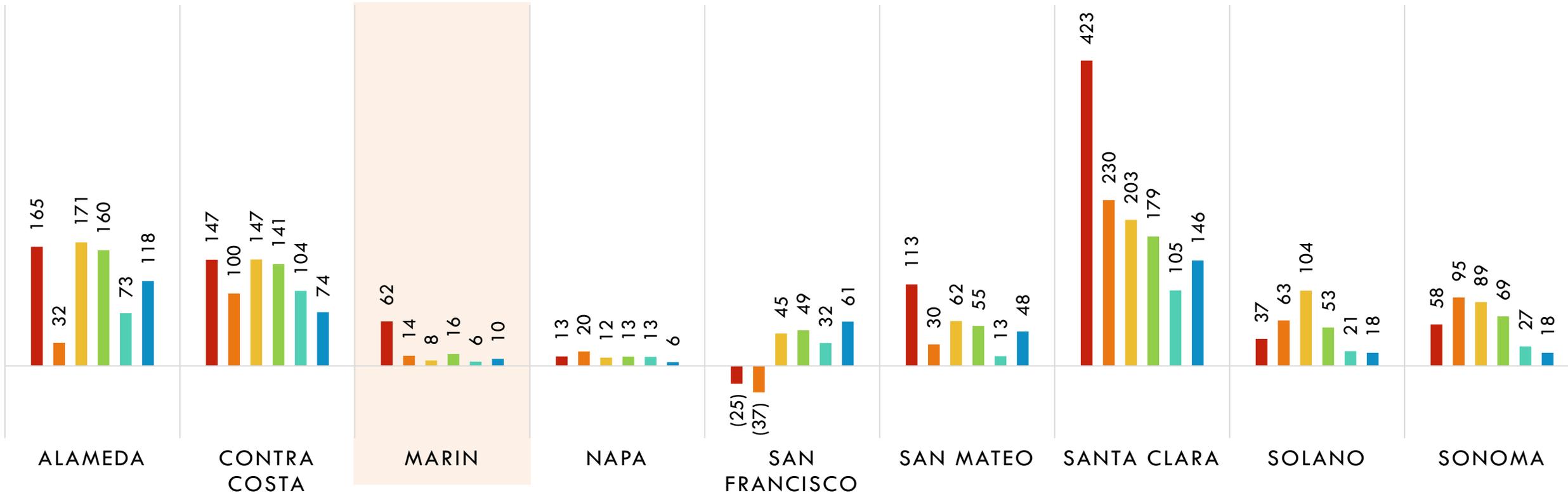
LOCAL FOCUS



**North Bay counties have similar growth trajectories; regional growth has been increasingly concentrated in the core.**

**NOMINAL CHANGE BY COUNTY (IN THOUSANDS)**

■ 1960s ■ 1970s ■ 1980s ■ 1990s ■ 2000s ■ 2010s



Source: California Department of Finance; note: 2010s spans six years between 2010 and 2016

REGIONAL PERFORMANCE

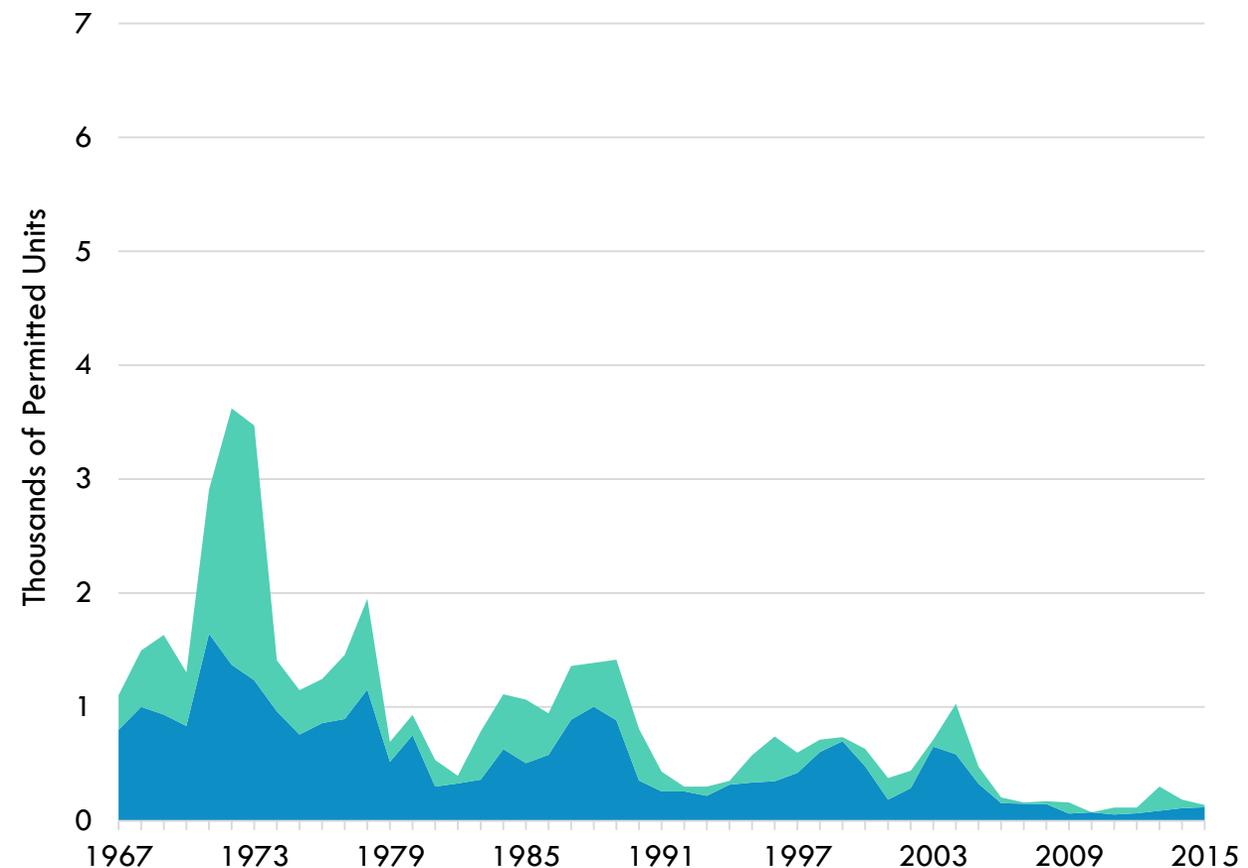
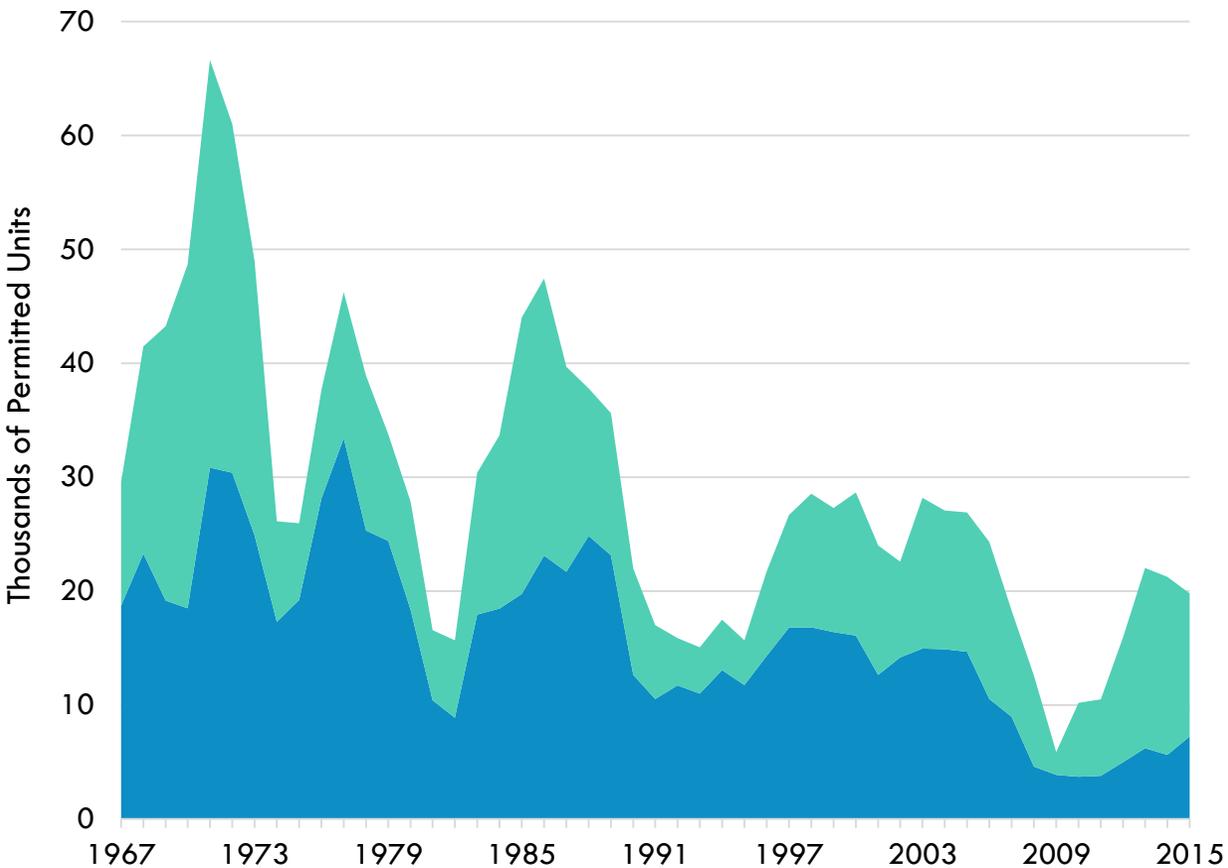
Permitting has declined on the regional and county levels.

PERMITTED UNITS BY YEAR – BAY AREA

PERMITTED UNITS BY YEAR – MARIN COUNTY

■ Single-Family Units ■ Multi-Family Units

■ Single-Family Units ■ Multi-Family Units



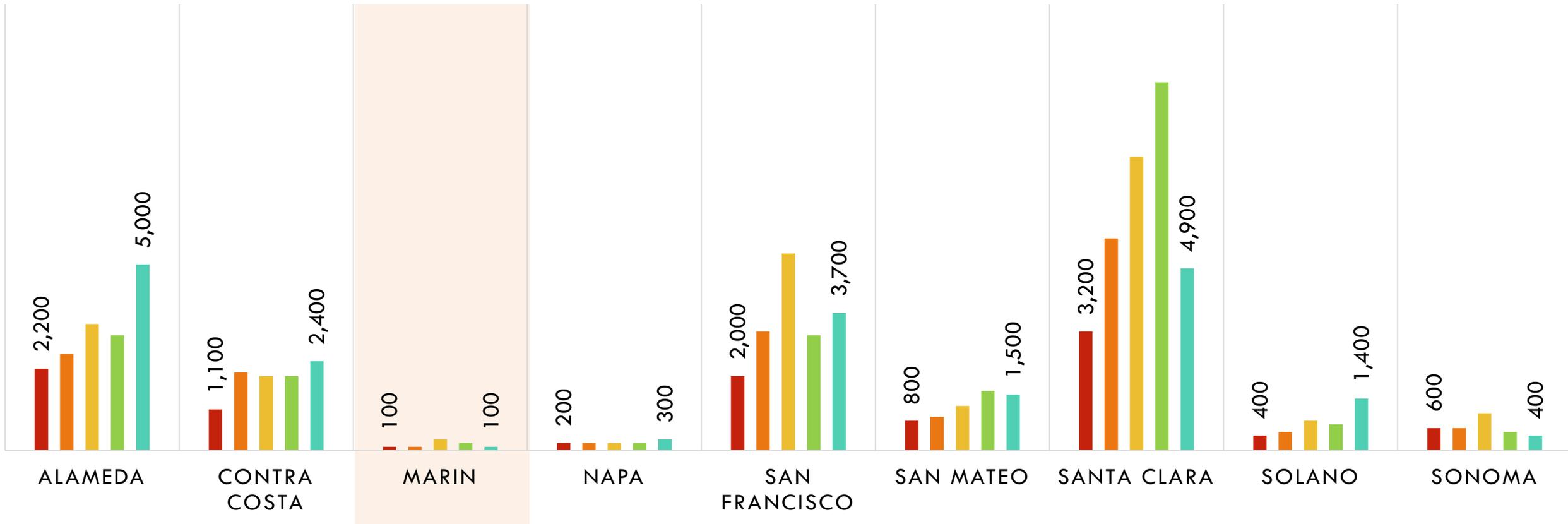
Source: Construction Industry Research Board (1967-2010); California Homebuilding Foundation (2011-2015)

LOCAL FOCUS

**Outside the North Bay, permitting has accelerated noticeably.**

**ANNUAL HOUSING UNITS PERMITTED (SINCE 2010)**

■ 2011 ■ 2012 ■ 2013 ■ 2014 ■ 2015

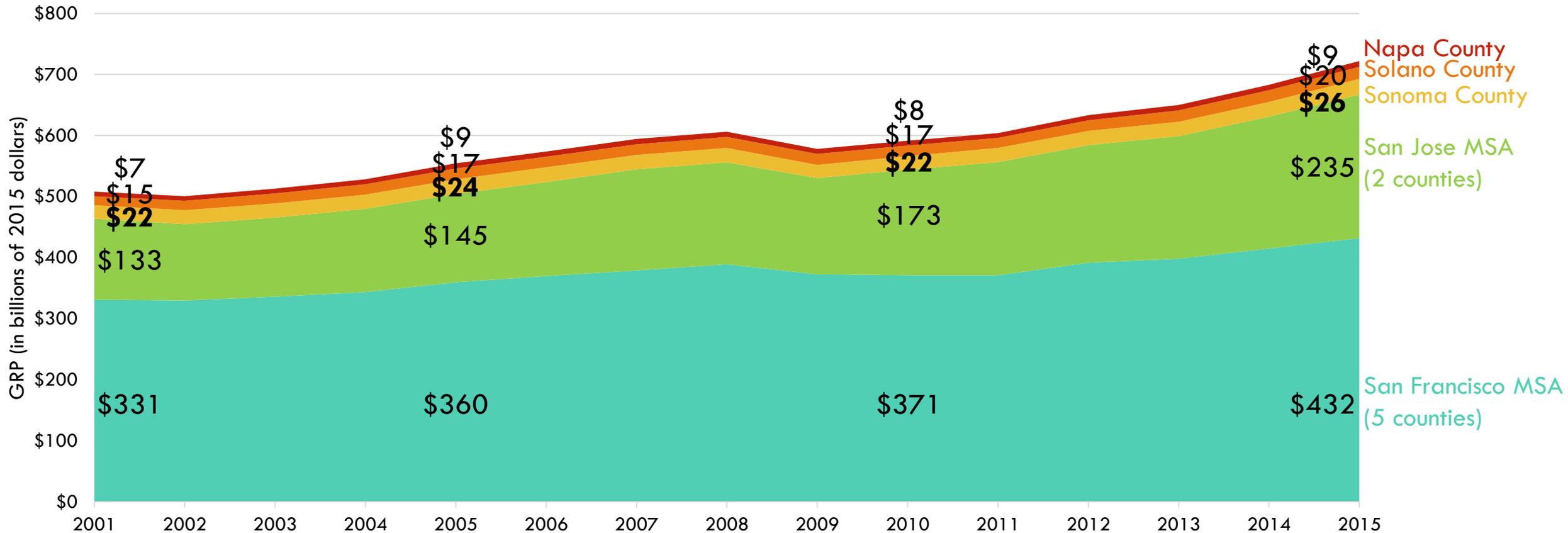


- ① While growth in the Bay Area has slowed over time, Marin County has decelerated more rapidly than other counties.
- ② **The current economic boom has resulted in low unemployment and a widening gap between rich and poor.**
- ③ While Marin County is more prosperous than its peers, it too is experiencing impacts from displacement and migration.
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LOCAL FOCUS

The Bay Area economy is growing rapidly – especially in the San Francisco and San Jose MSAs.

GROSS REGIONAL PRODUCT BY SUB-REGION



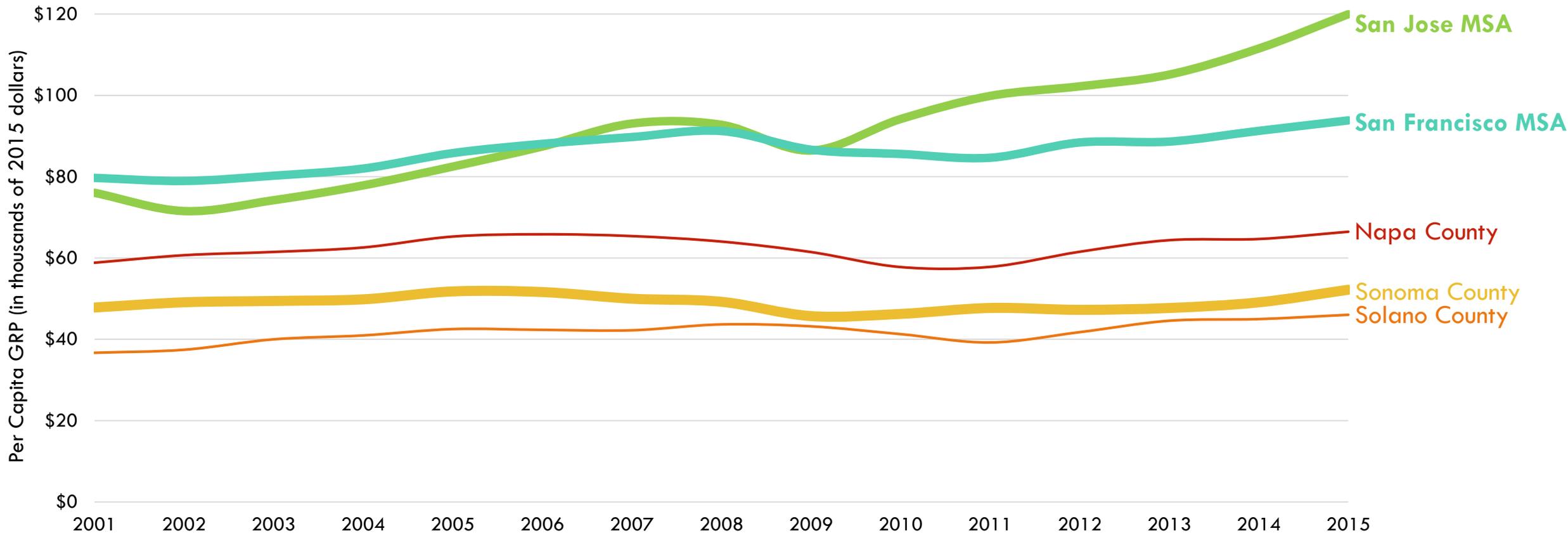
Source: Bureau of Economic Analysis (inflation-adjusted to 2015 dollars)

Note: GRP is reported at the MSA level; the San Jose MSA include Santa Clara County and San Benito County

LOCAL FOCUS

# Silicon Valley is booming, widening the gap in per capita GRP between northern and southern parts of the Bay Area.

## GROSS REGIONAL PRODUCT PER CAPITA

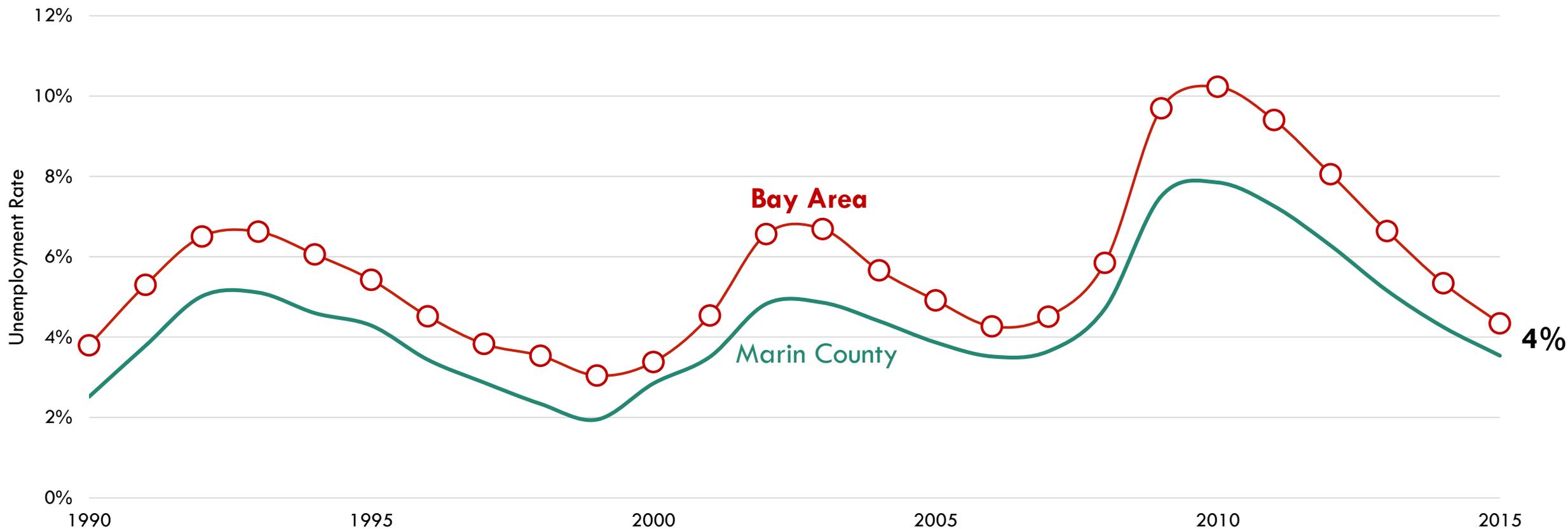


Sources: Bureau of Economic Analysis (inflation-adjusted to 2015 dollars); Department of Finance  
 Note: GRP is reported at the MSA level; the San Jose MSA include Santa Clara County and San Benito County

LOCAL FOCUS

**Marin County unemployment rates have been lower than the regional average every year since 1990.**

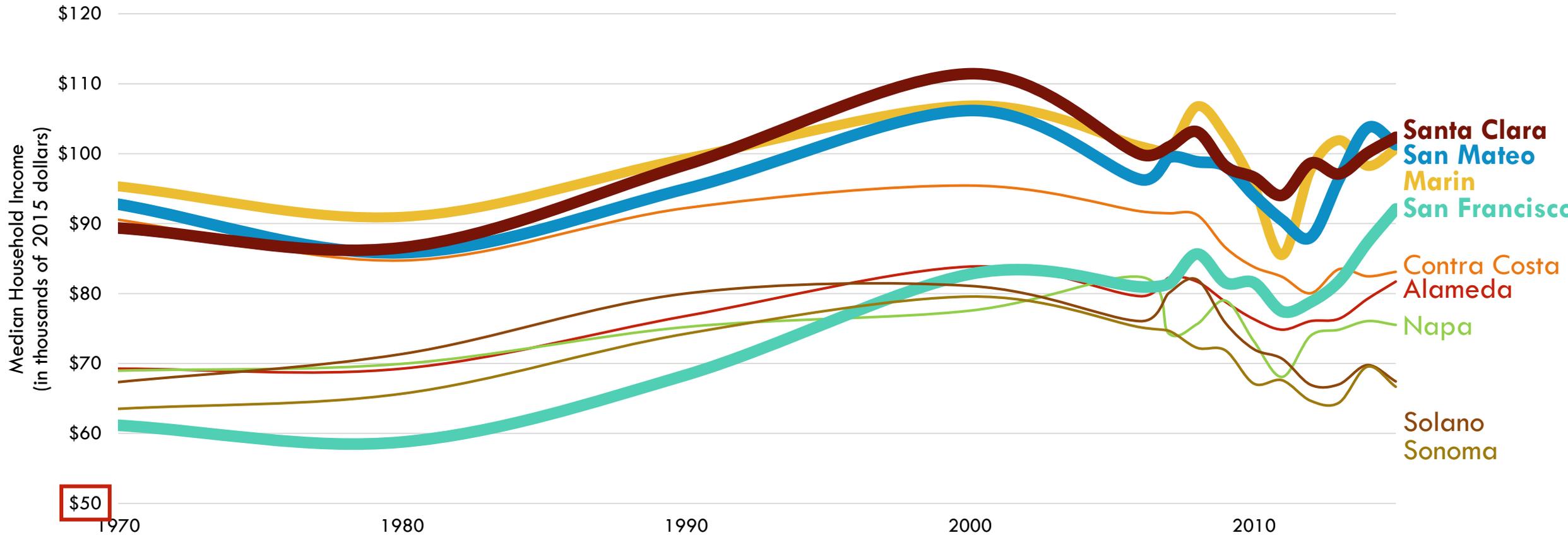
UNEMPLOYMENT – BAY AREA AND MARIN COUNTY



LOCAL FOCUS

**Marin County residents have some of the highest incomes in the Bay Area – but many work outside of the county.**

MEDIAN HOUSEHOLD INCOME BY COUNTY

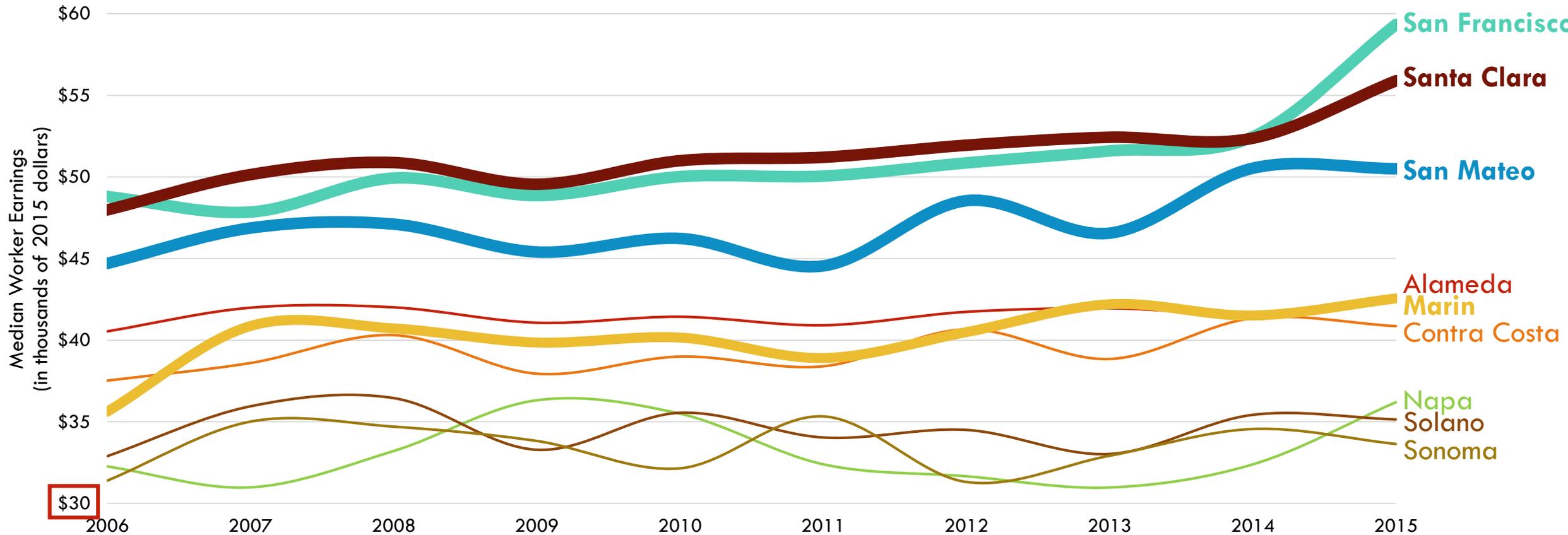


LOCAL FOCUS



**In contrast, Marin County workers earn significantly less than their peers in San Francisco and Silicon Valley.**

**MEDIAN WORKER EARNINGS BY COUNTY**



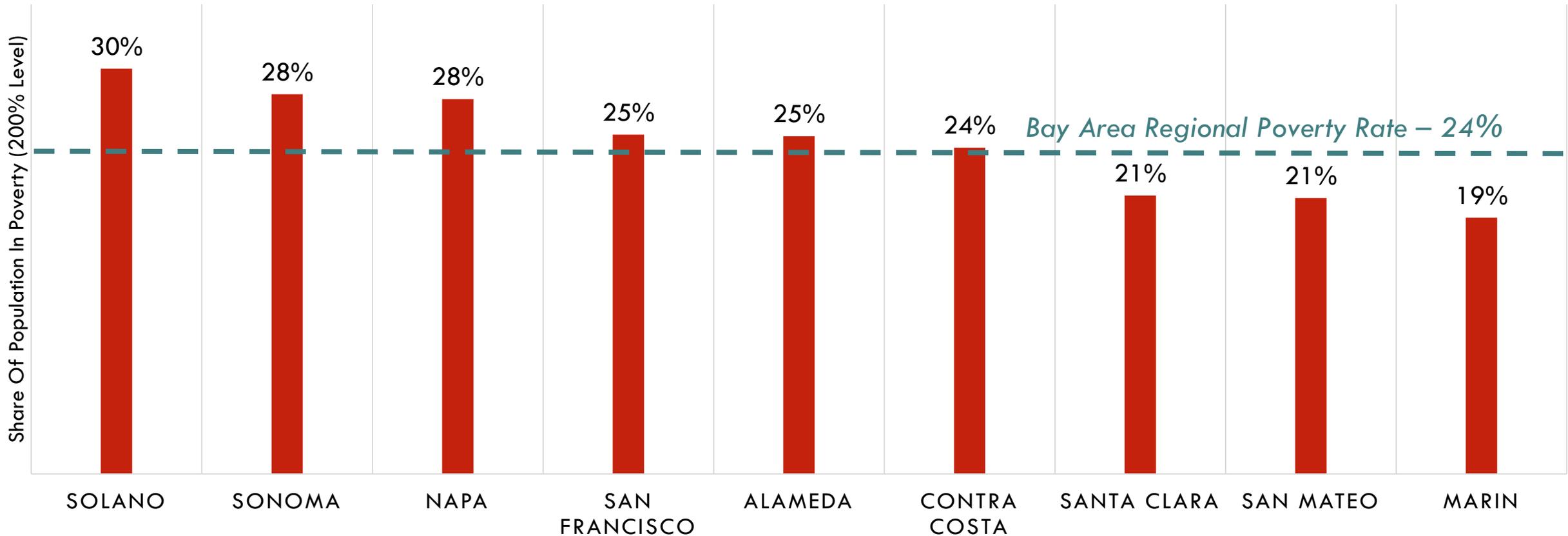
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LOCAL FOCUS



**In contrast to neighboring North Bay counties, Marin County's poverty rate is the lowest in the region.**

2015 POVERTY RATE BY COUNTY



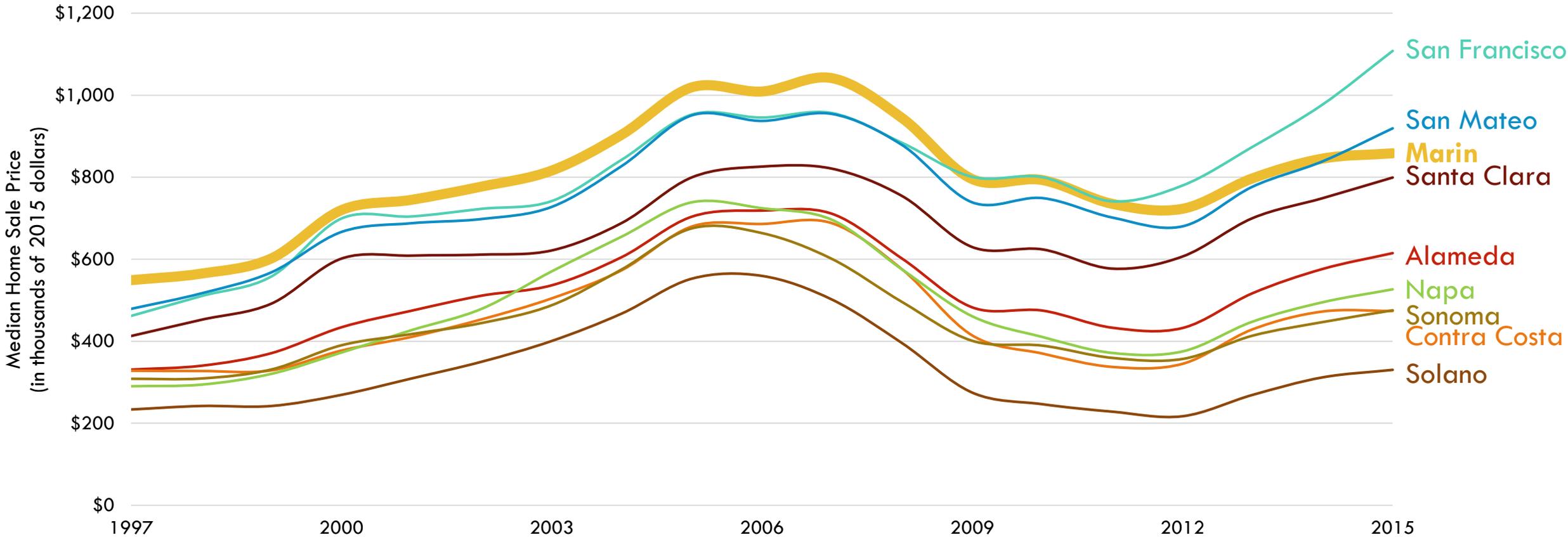
Source: U.S. Census Bureau/American Community Survey, 2015  
 Note: poverty is defined as living below twice the national poverty level



LOCAL FOCUS

Marin County home prices have risen since the end of the recession but remain below their 2007 peak.

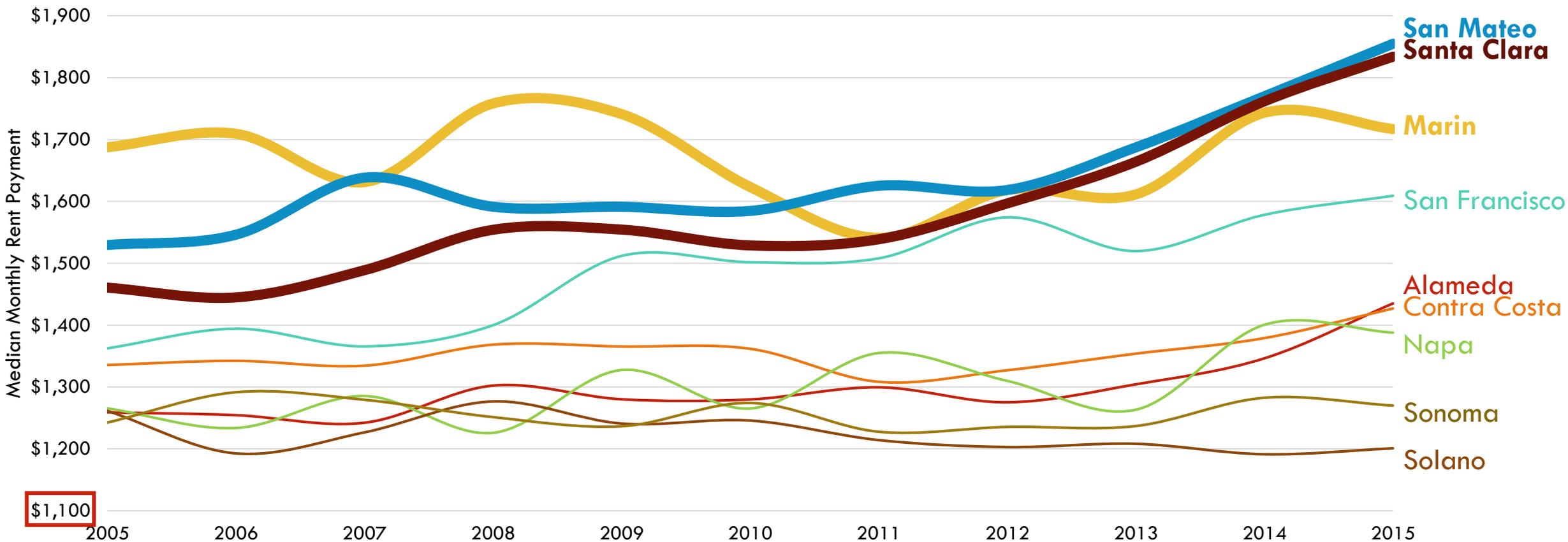
MEDIAN HOME SALE PRICE BY COUNTY



LOCAL FOCUS

Marin now has the third-highest rents in the region, surpassed only by San Mateo and Santa Clara counties.

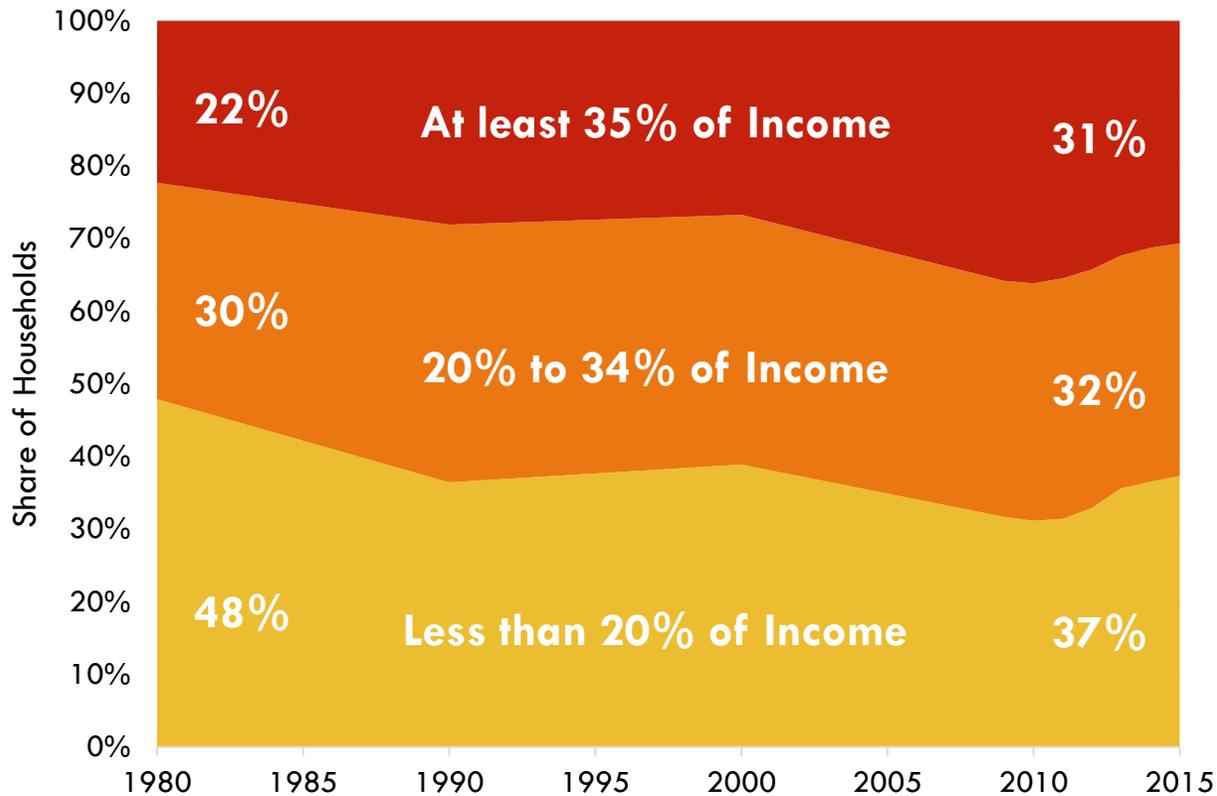
MEDIAN RENT PAYMENTS BY COUNTY



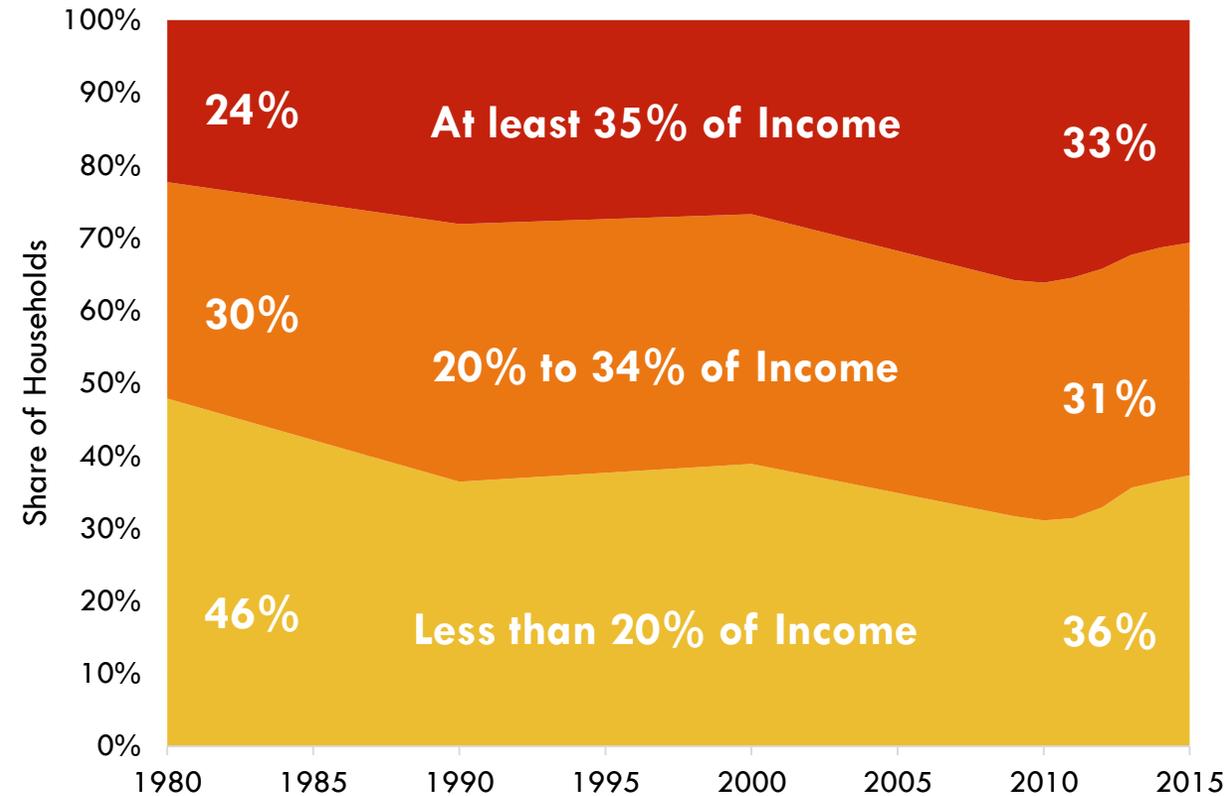
REGIONAL PERFORMANCE

**Marin County's housing affordability – as a share of income – has closely tracked regional trends since 1980.**

**SHARE OF HOUSEHOLD INCOME SPENT ON HOUSING – BAY AREA**



**SHARE OF HOUSEHOLD INCOME SPENT ON HOUSING – MARIN COUNTY**

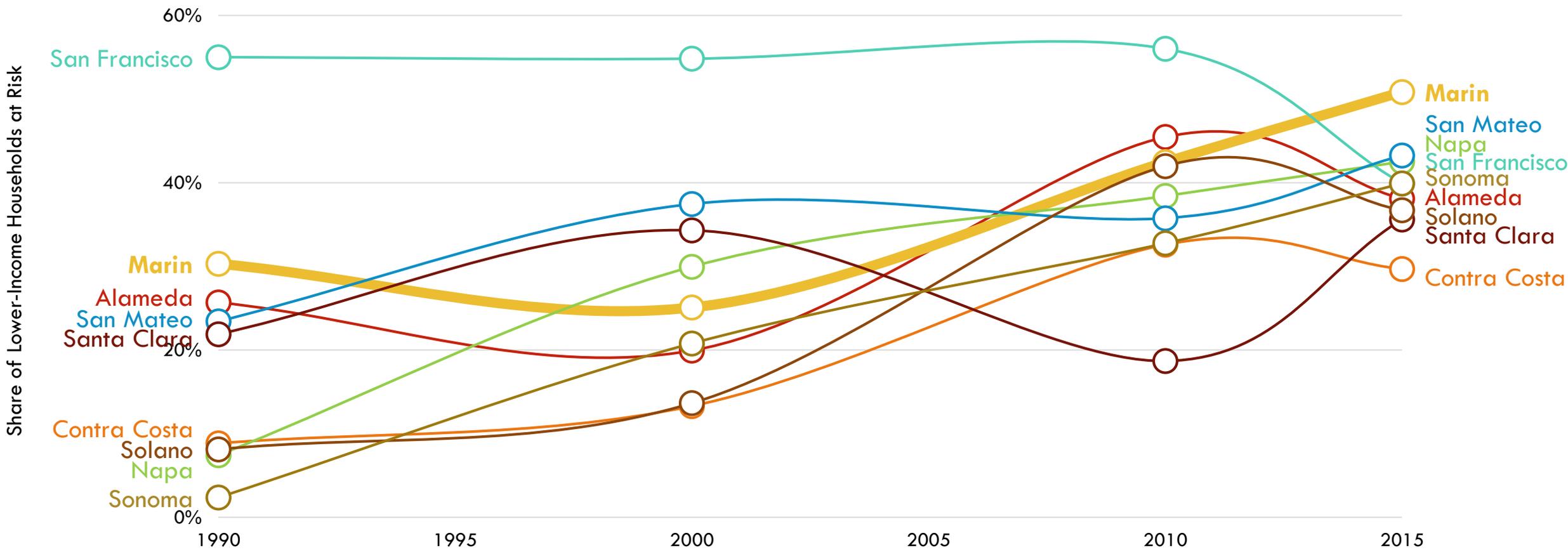




LOCAL FOCUS

**Of the nine Bay Area counties, Marin County's lower-income residents are the most at risk of displacement.**

DISPLACEMENT RISK BY COUNTY



Sources: U.S. Census Bureau/American Community Survey; Longitudinal Tract Database; note that recent data relies upon 5-year rolling averages; only 2010 and 2015 are shown for clarity



LOCAL FOCUS

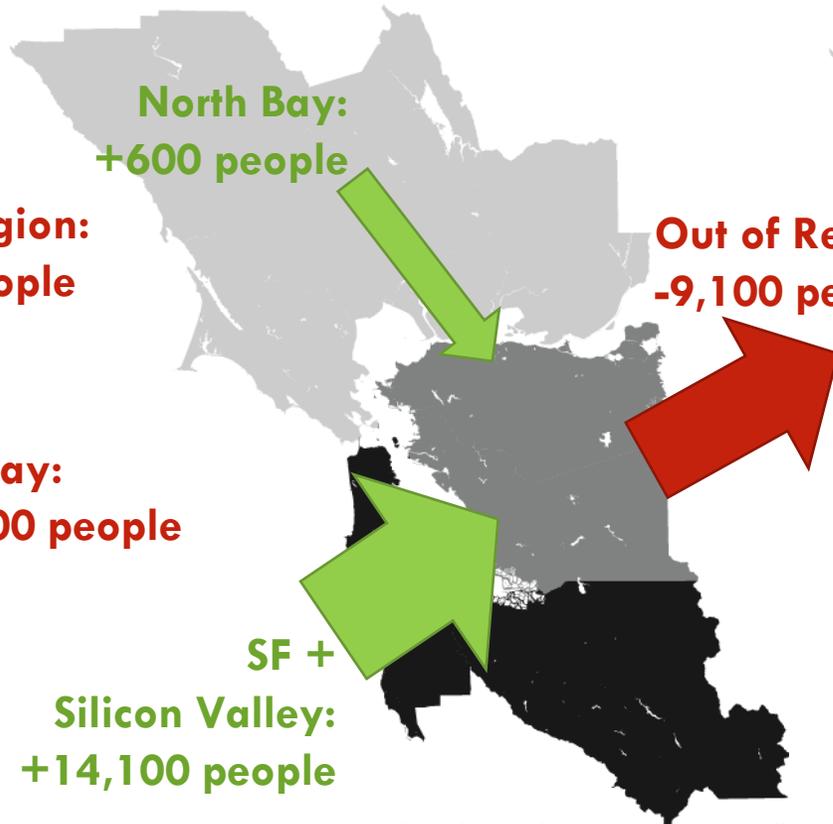
**North Bay residents are increasingly moving out of the region and are being replaced by new arrivals from the West Bay.**

2014 NET MIGRATION BY SUBREGION

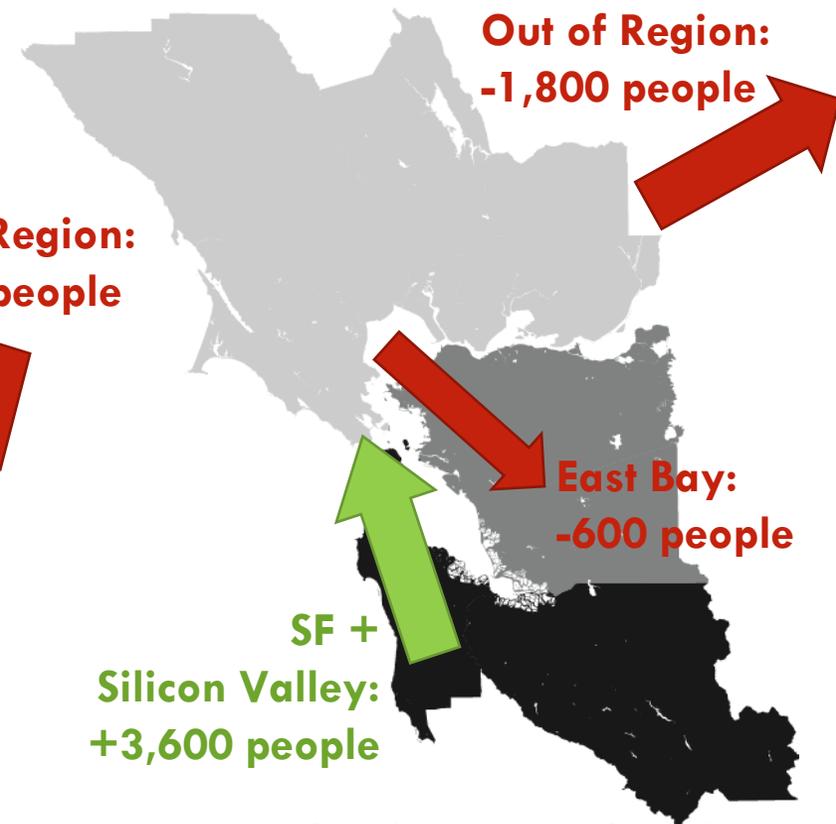
**SAN FRANCISCO + SILICON VALLEY**



**EAST BAY**



**NORTH BAY**



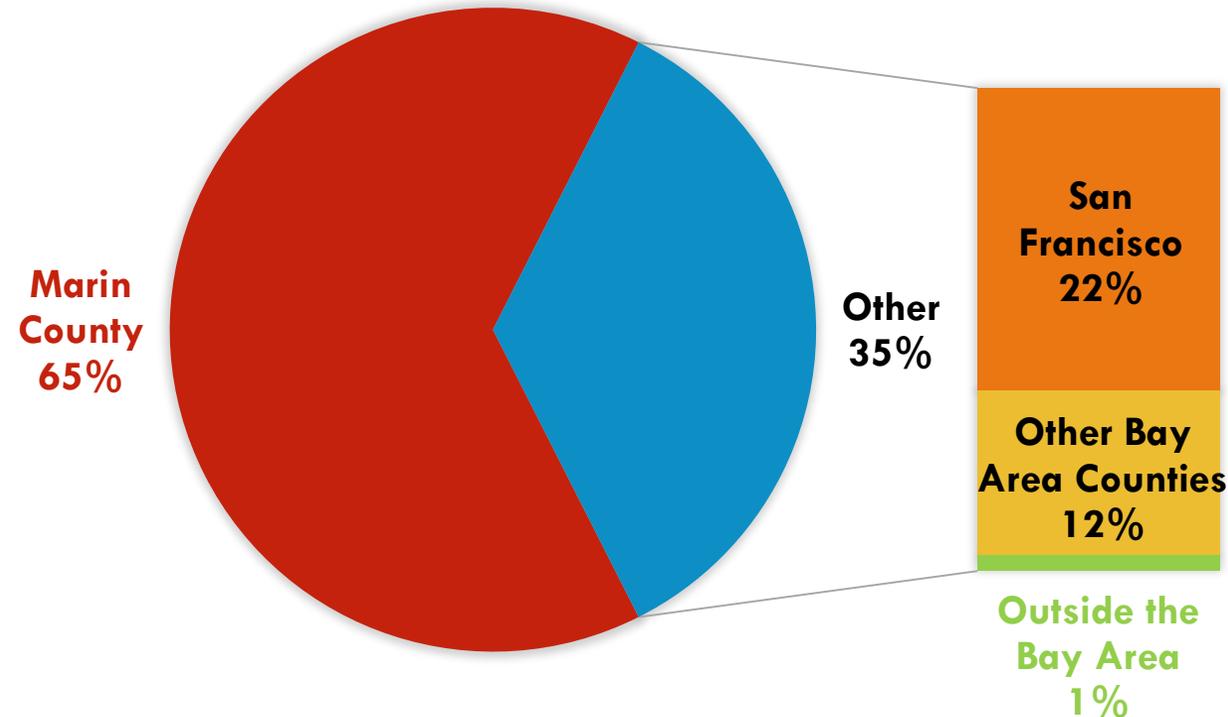
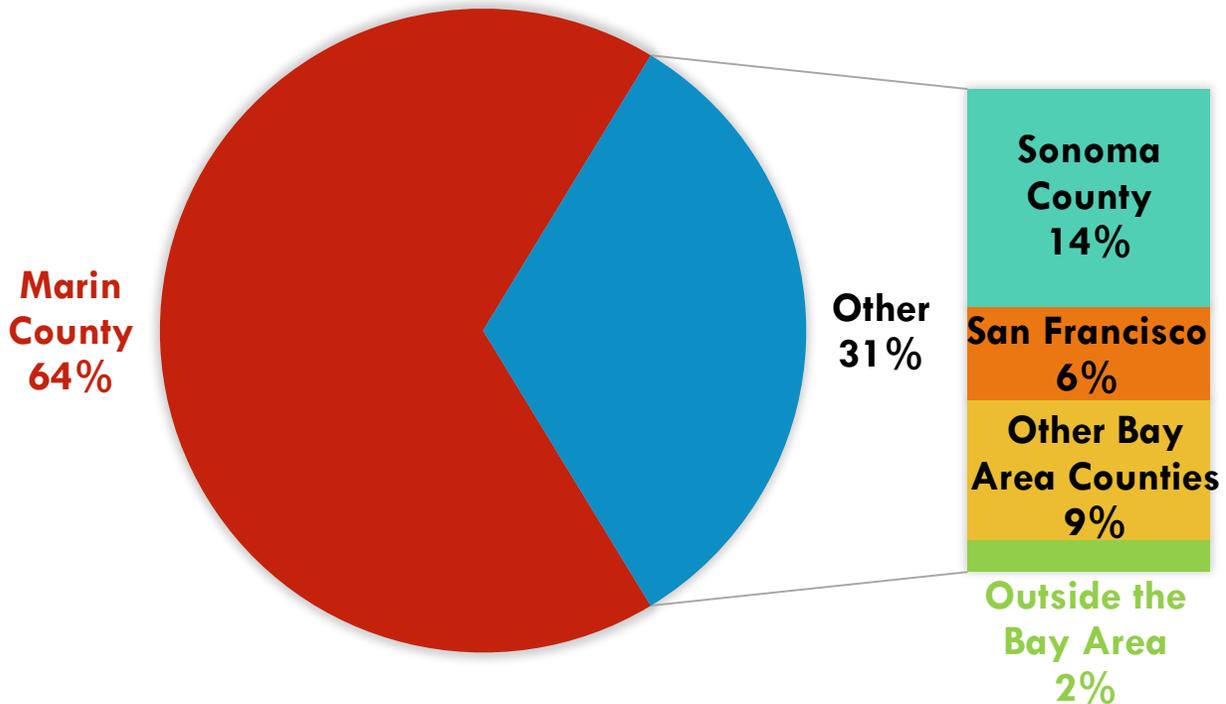
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LOCAL FOCUS

**Because of the county's job-housing imbalance, significant shares of workers and residents commute between counties.**

**COMMUTE ORIGINS OF MARIN COUNTY WORKERS**

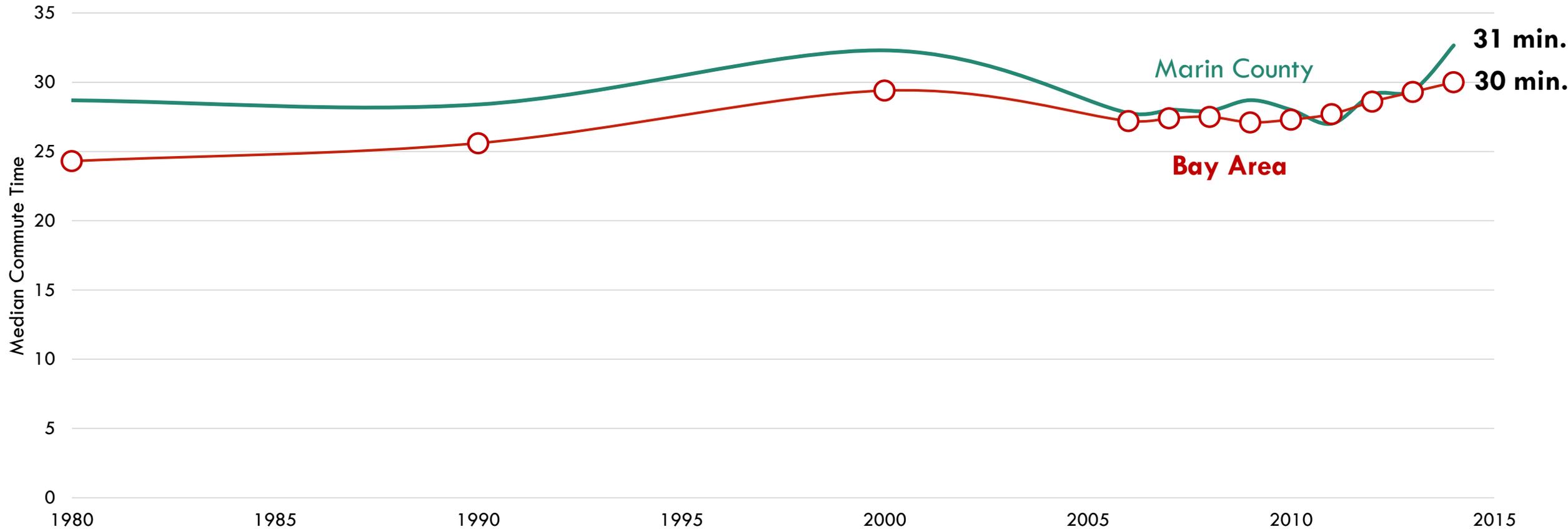
**COMMUTE DESTINATIONS OF MARIN COUNTY RESIDENTS**



REGIONAL PERFORMANCE

**Commute times have ticked upward regionally in recent years – and Marin County is no exception to this trend.**

COMMUTE TIMES – BAY AREA AND MARIN COUNTY

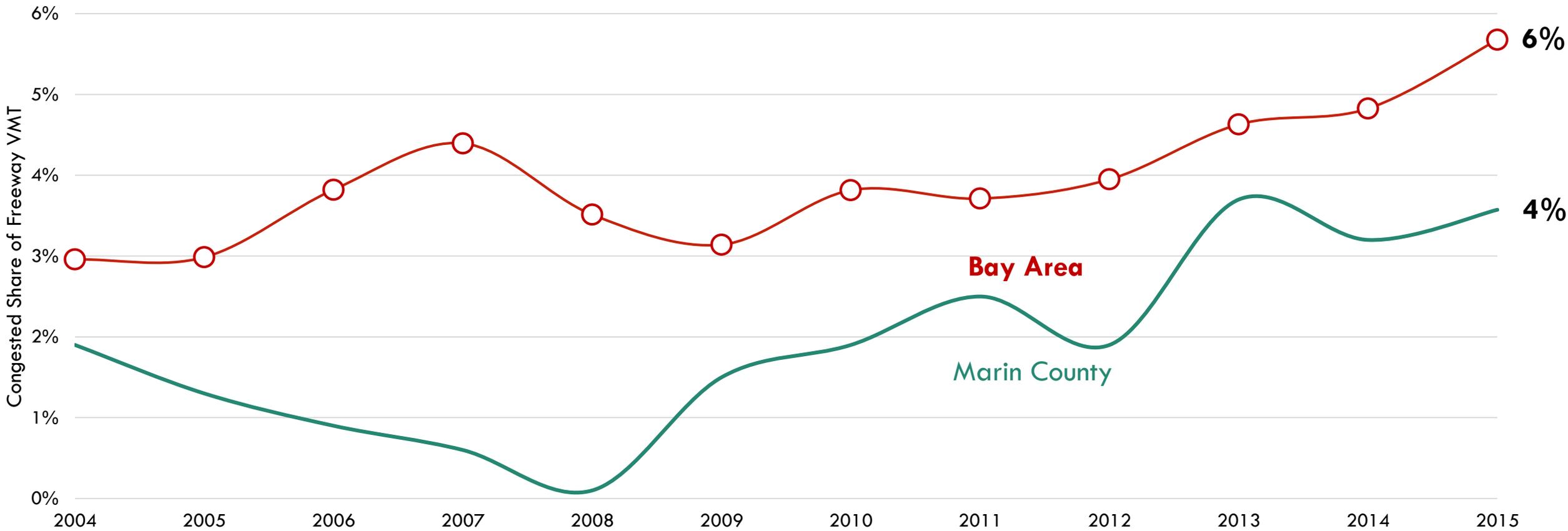




REGIONAL PERFORMANCE

**While traffic congestion in Marin remains slightly less severe than the region as a whole, it has grown markedly since 2008.**

MILES TRAVELED IN CONGESTION – BAY AREA AND MARIN COUNTY



Source: Iteris/PeMS, 2015



REGIONAL PERFORMANCE

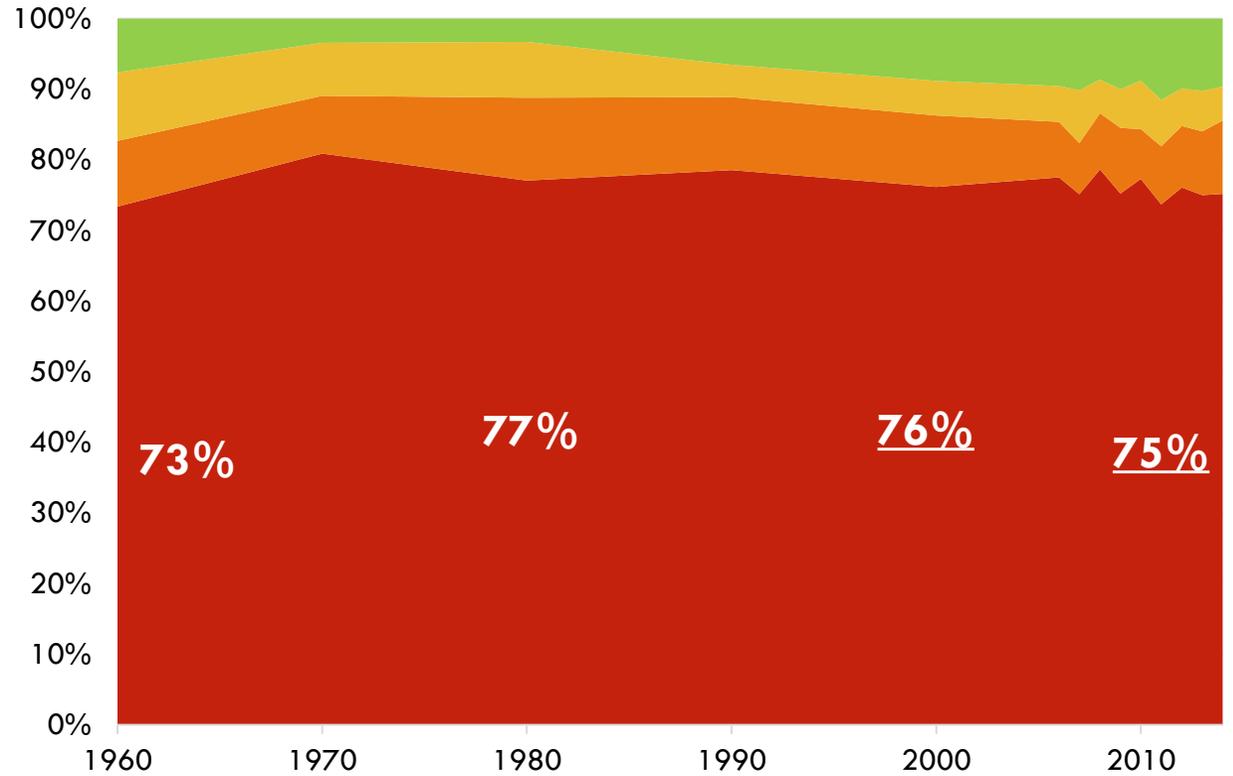
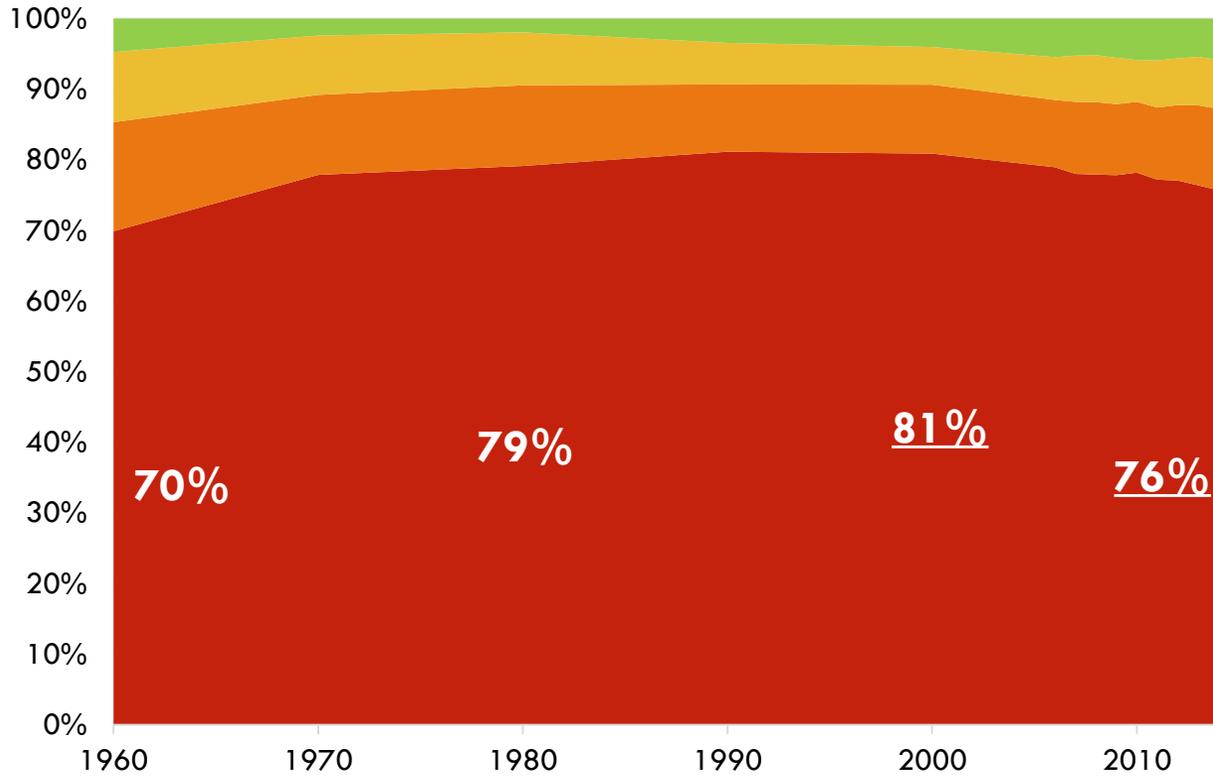
The Bay Area has made significant progress in shifting travel modes in recent years, but at a slower pace in Marin.

COMMUTE MODE SHARE – BAY AREA

COMMUTE MODE SHARE – MARIN COUNTY

Auto Transit Walk, Bike, Other Work at Home

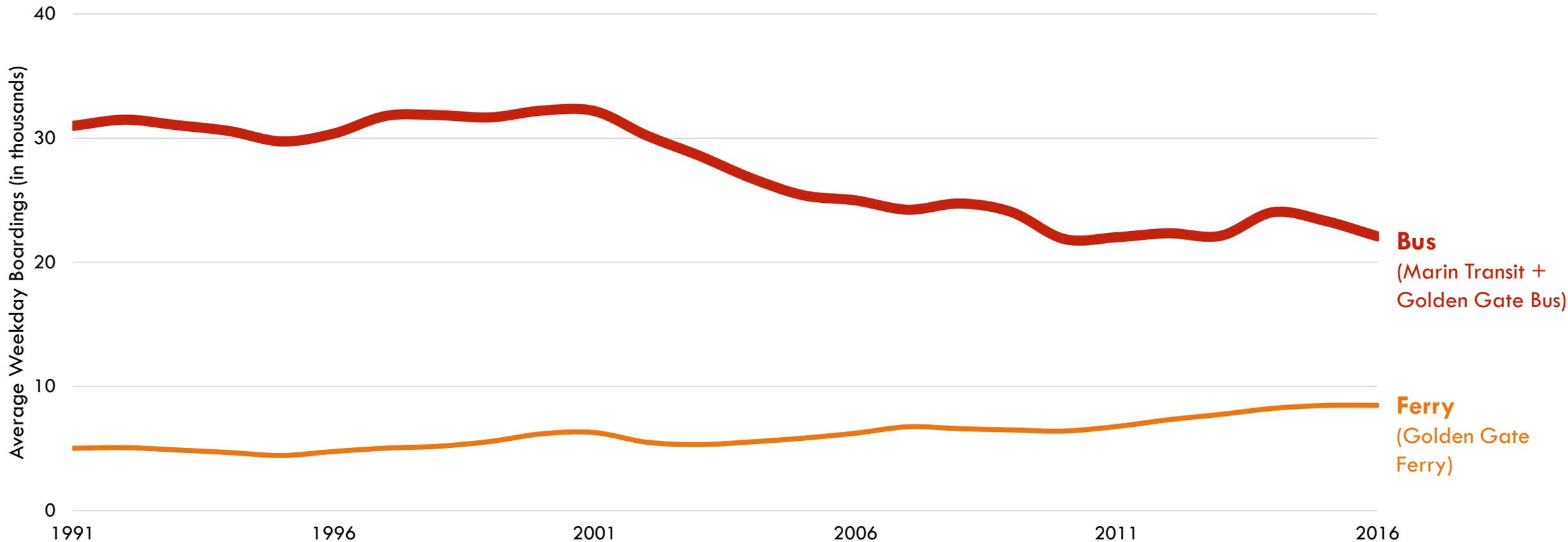
Auto Transit Walk, Bike, Other Work at Home



LOCAL FOCUS

**In the case of Marin, this trend is due in part to declining bus ridership even as ferry usage has increased.**

**ANNUAL AVERAGE WEEKDAY RIDERSHIP FOR MARIN COUNTY OPERATORS**



Note: Estimated average weekday boardings is annual boardings divided by 300 (standard MTC factor)

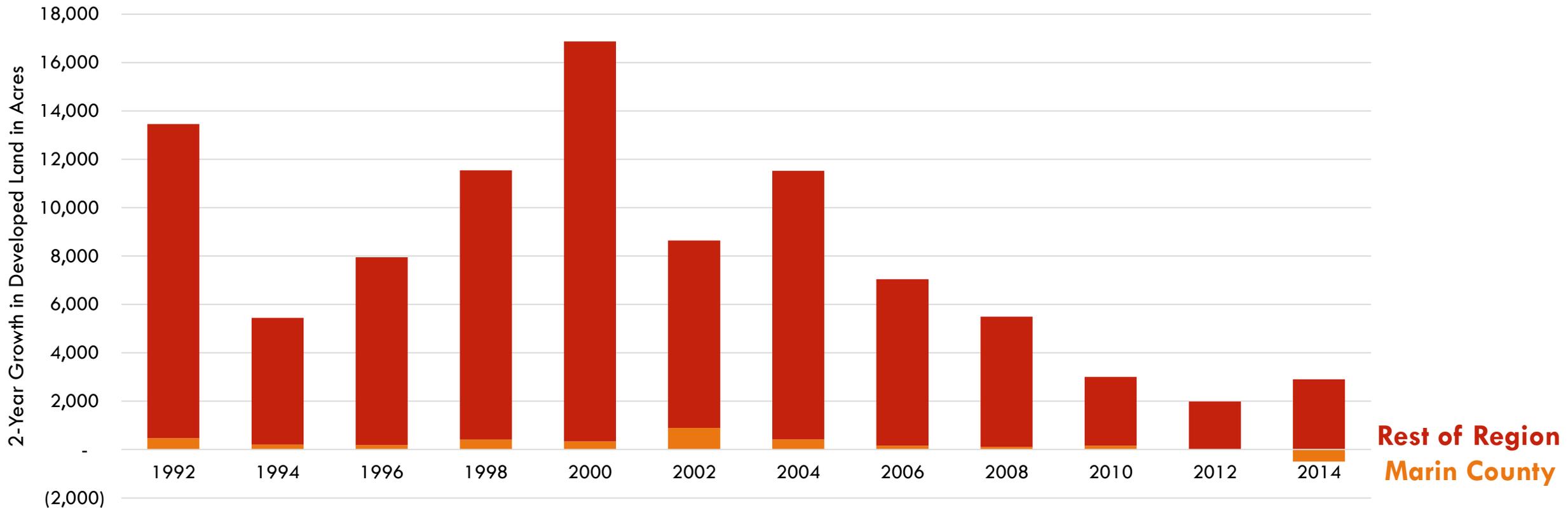
Source: FTA NTD Annual Database, 2015; FTA NTD Monthly Adjusted Data (preliminary), 2016

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REGIONAL PERFORMANCE

# Greenfield protection policies in Marin County and beyond have made a difference in protecting natural lands.

**TWO-YEAR CHANGE IN REGIONAL GREENFIELD DEVELOPMENT  
(CHANGE IN DEVELOPED LAND)**

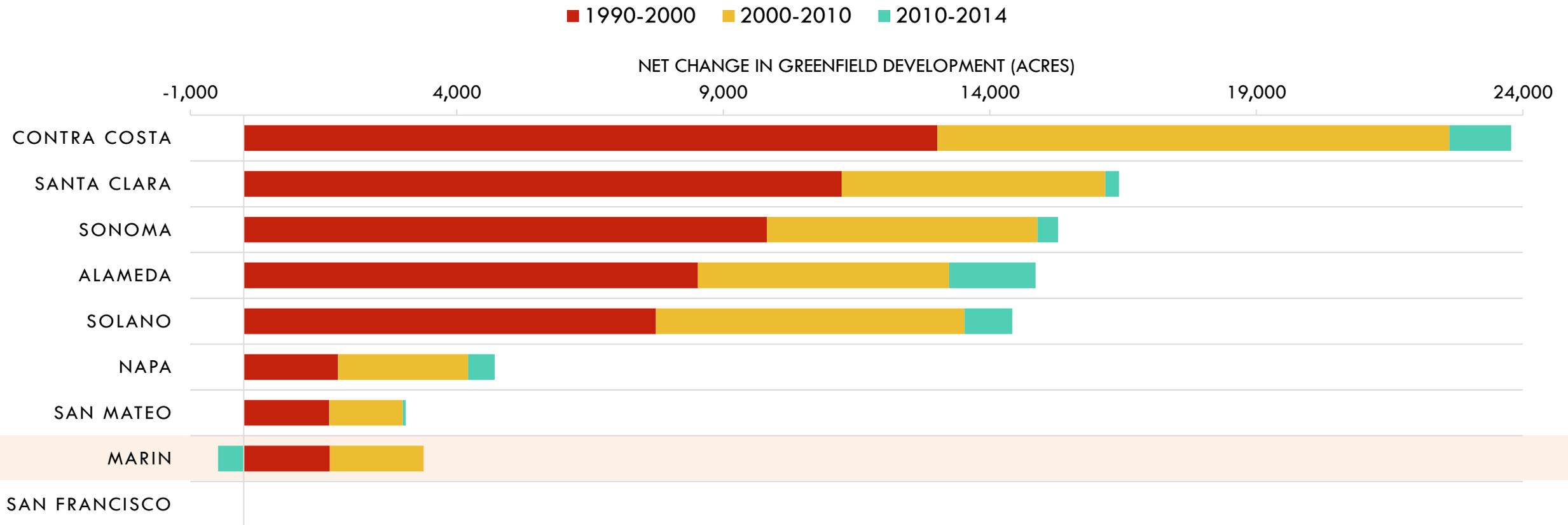


Source: Department of Conservation, Farmland Mapping and Monitoring Program

LOCAL FOCUS

**Marin County has protected its greenfield lands to a greater extent than most other Bay Area counties.**

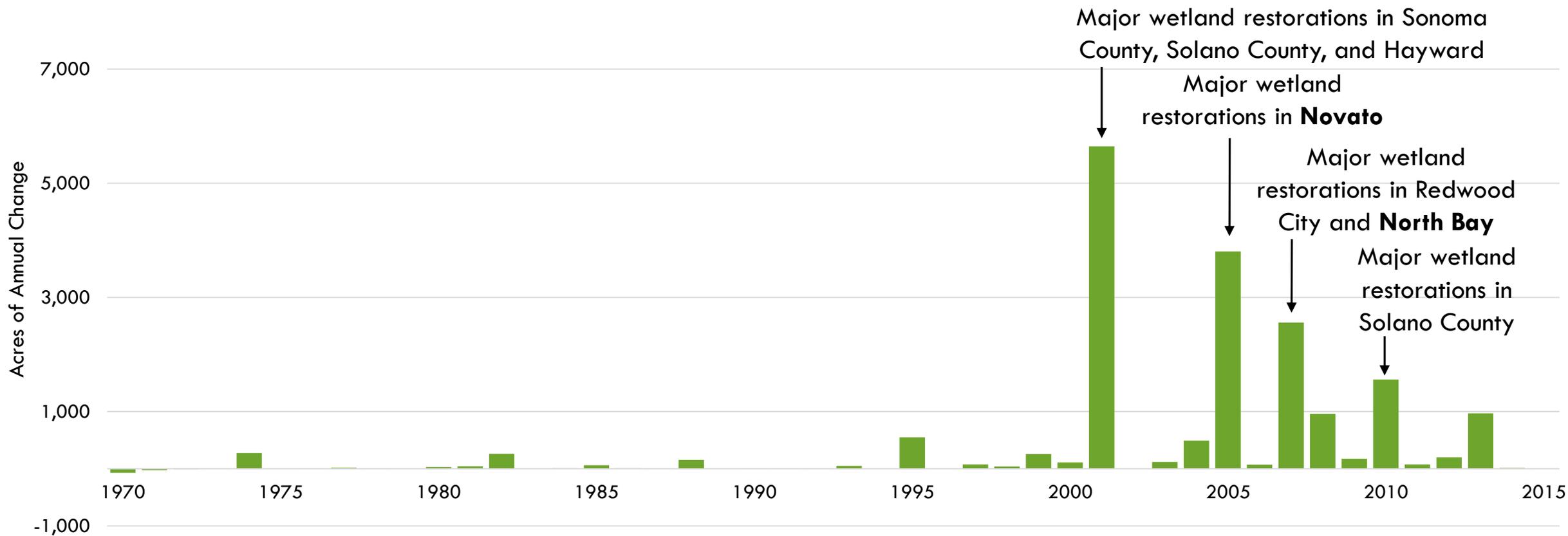
**COUNTY GREENFIELD DEVELOPMENT GROWTH AND DECLINE BY DECADE**



REGIONAL PERFORMANCE

**Major investments in wetland restoration in the mid-2000s resulted in thousands of new acres of Bay surface area.**

ANNUAL CHANGE IN SAN FRANCISCO BAY SURFACE AREA



# VITAL SIGNS

# QUESTIONS?

**DAVID VAUTIN, MTC**  
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**UPCOMING DATA RELEASES:**  
**LATE SPRING 2017 – TRANSPORTATION**  
**SUMMER 2017 – ENVIRONMENT**

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